RV BUSINESS

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MARCH 8, 1991

Early Retail Show Reports Are Positive

A sampling of some of the early RV shows across the nation indicates that consumer confidence in many areas may be stronger than anticipated, and that RV manufacturers and dealers have reason to be optimistic about the outlook for '91. Apparently, a shaky economy, a nervous stock market and war in the Middle East aren't putting the brakes on consumer interest in the RV lifestyle.

Robert Atwell, co-manager of the Great Lakes Recreation Vehicle Show, Cleveland, Ohio, reported a higher turnout for this year's show, a distinct change from the last two years. Noting that the boat show that followed the RV show by one week had a 40% drop from last year's gate, Atwell said, "I can only conclude that this is strong evidence that interest in RVs remains high and the buyers are out there."

Jim Crow, president of Jim's Trailer Sales Inc., Grafton, Ohio, echoed those sentiments. Crow, who was this year's chairman of the Cleveland show, said, "Attendance was indeed up over the last few years, and we think there was a definite upswing in first-time buyer attendance. What we also saw, however, was that there seems to be a lot of hesitation among buyers. The interest in the product is there, but the buyers are definitely preoccupied by the Middle East and the general state of the national economy."

Crow added that, for him, as

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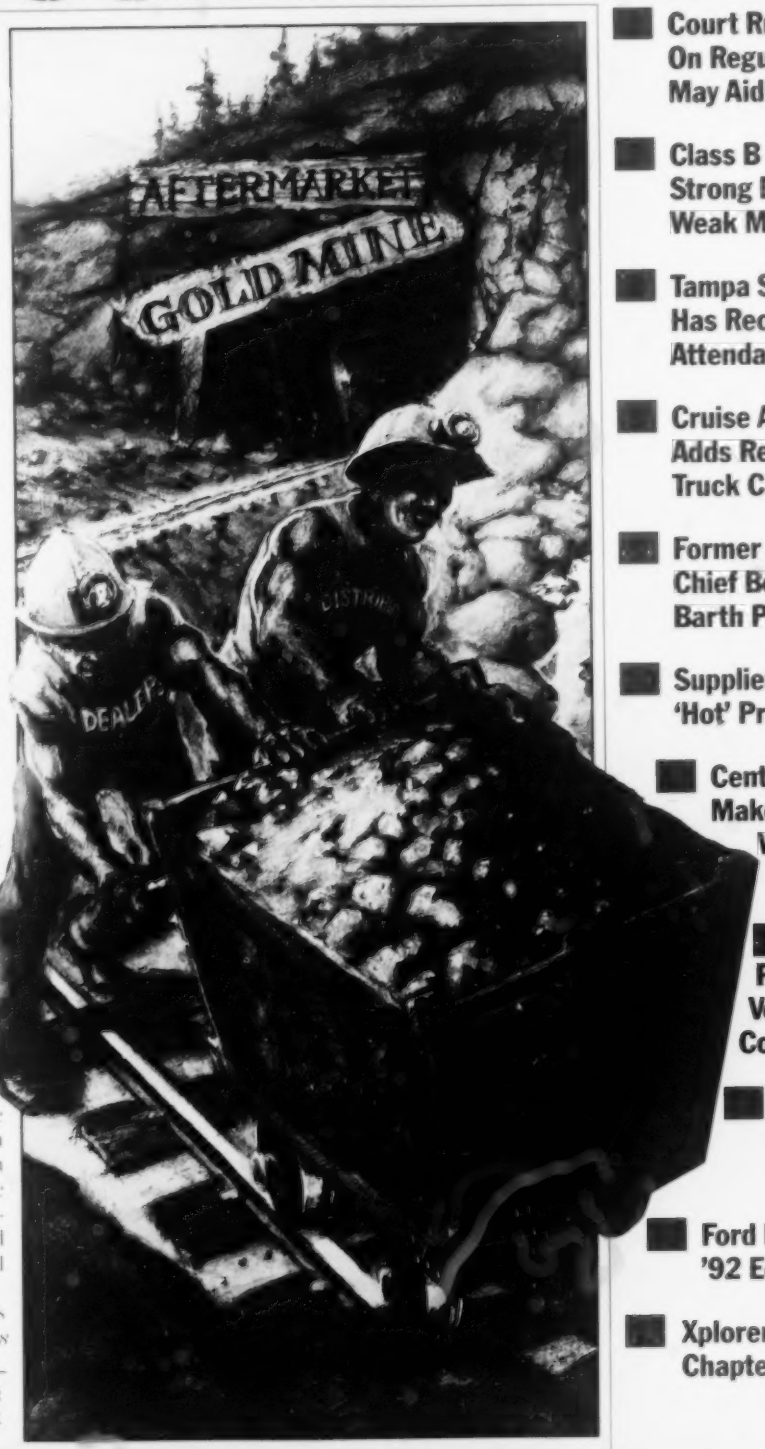

MINING THE AFTERMARKET: How to unearth aftermarket profits. See page 28.

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- Tampa Show Has Record Attendance
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Distributors can help dealers discover a mother lode of parts-and-accessories profits to help add more glitter to bottom lines. Dealers and distributors describe how to use a good business partnership to develop aftermarket sales, both as a countercyclical strategy and as a way to enhance unit sales and profits.

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BOTTOMING OUT IN NOVEMBER?

MORTON J. MARCUS

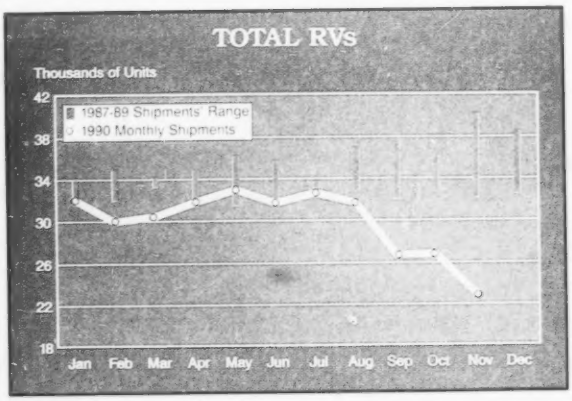
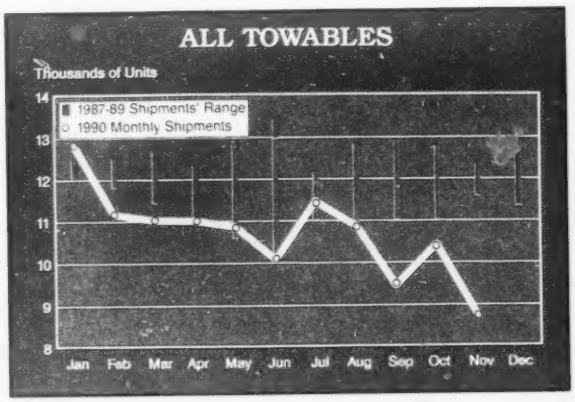


Figure 1



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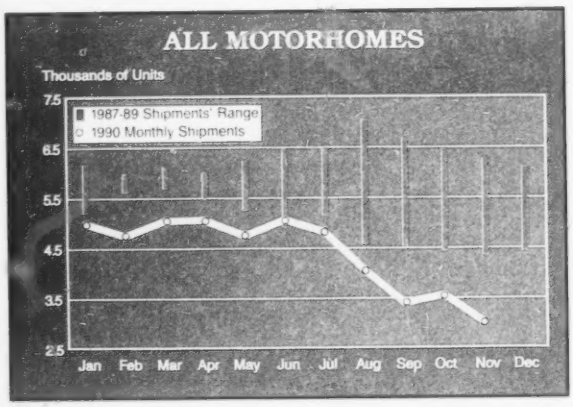


Figure 3

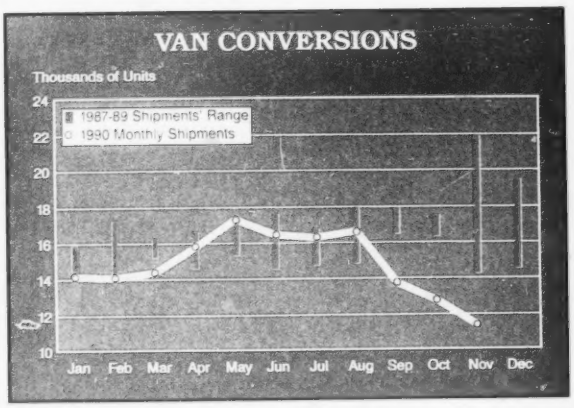


Figure 4

November 1990 was the month in which we elected most of the same people to Congress. In November, the President observed Thanksgiving with the troops in Saudi Arabia. And in November, the RV industry heard the second shoe of the recession drop.

Was November 1990 the end of the slide, or is there more bad news to come?

Last September had seen a significant decline of 16.1% in shipments from August levels. That was the sound of the first shoe dropping, as the nation adjusted to the economic and psychological tensions of the Persian Gulf conflict. October 1990 was then a flat period. Then, last November, based on the latest data from RVIA, showed another one-month decline of approximately the same percentage (16.3%) after seasonal adjustment.

On the surface, September and November seem to have experienced equally bad declines, but that would be an erroneously negative conclusion. The decline of September 1990 equaled approximately 5,100 units; November's drop-off was 3,800 units. Although the percentage declines were comparable, the actual decrease in November was considerably less than that of September of last year.

Too frequently, we allow ourselves to be impressed erroneously by percentages. Our real concern is the shipment and sale of RV units. Percentage points are often useful for analysis and help us to compare dissimilar numbers. However, no customer ever rolled away in a Class A percentage point. People buy and use physical units, not percentage points. Hence, what is important is that, when the second shoe dropped in this recession last November, it involved a lesser decline in number of units

GRAPHICS: DIGITAL LIF

than September's drop.

Putting It in Perspective

The level of total shipments in November 1990 was 22,960 units, which was well below the range for November of the preceding three years. *(See Figure 1.)* With such low levels of RV shipments, it is natural to ask, "When was the last time things were this bad?"

Total RV shipments had not been this low since October 1982, when the nation was just one month from the bottom of its last recession. But by that point, RV shipments had already regained strength from the record low of 10,400 units shipped in November of 1980—10 years earlier. As of November 1980, the nation had just come through the first stage of its long (1979-1982) recession, and, although matters would get worse for the nation, the RV industry was on an upswing.

It is instructive to look back and place our own times in perspective. Today, we bemoan a decline that puts shipments 35.6% below year-earlier figures. In October 1980, total RV shipments had fallen by 62.7% from October 1979. That was a huge decline, but it ranked second to the truly enormous decline of 72.7% in January 1974. In early 1974, when the OPEC nations first flexed their collective muscle, shipments fell from 58,000 units in January 1973 to just 15,800 in the opening month of 1974.

The Detailed View

Just as total shipments were way down in November 1990, so, too, were the various sectors off their pace of the past three years. Towables reached only 8,740 units last November. *(See Figure 2.)* Motorhomes, at 3,050 units shipped in November, and van conversions, at 11,180 shipments, were both below the range of recent years. *(See Figure 3 and Figure 4.)*

For perspective, consider these historical comparisons: It was 60 months earlier, in December 1985, when travel trailers were as low as last November's level. Truck campers were at similarly low levels more recently, in September 1986. Van conversions last saw such a low level in December 1982. But for folding camping trailers, we must reach back to August 1980 to find a level as low as November 1990.

Not all types of RVs were down in November. There were extremely modest gains made by park models and Class B motorhomes.

Compared with October 1990, November's shipments fell 14.4%—with towables leading the decline with a 16.5% reduction.

PERCENT MARKET SHARE BY TYPE OF UNIT
(Year-to-date, adjusted for seasonal variation)

	1990	1989	Change
TOTAL RVs	100.00	100.00	0.00
Travel Trailers:	24.31	22.87	1.45
Conventional	14.42	13.56	0.86
Park Models	2.00	1.92	0.09
Fifth-wheels	7.89	7.39	0.50
Folding Camping Trailers	8.70	8.43	0.27
Truck Campers	2.70	2.50	0.21
TOTAL TOWABLES	35.72	33.80	1.93
Motorhomes:			
Class A	8.21	8.96	–0.75
Class B Van Campers	1.66	1.25	0.41
Class C:	4.91	5.29	–0.38
Minis	3.80	4.35	–0.55
Low Profiles	0.15	0.35	–0.19
Micro-minis	0.95	0.60	0.36
TOTAL MOTORHOMES	14.79	15.51	–0.72
Multiuse Van Conversions	49.49	50.70	–1.21

Percentages may not add to total because of rounding.

Figure 5

(See Figure 6.) Nonetheless, for 1990 year-to-date, towables had the upper hand within the industry. As seen in Figure 5, towables, alone among the major sectors, had gained market share by nearly two points as of last November. Nearly two-thirds of that gain has been at the expense of van conversions.

Overall, the decline in towables was just 3.8% for 1990 as of last November. Shippers of motorhomes, which were down 13.2%, and van conversions, which were down 11.1%, must envy such a moderate loss. Clearly, the problems are in motorized units, which share many of the difficulties experienced by the nation's automotive industry.

The Path Ahead

It is probably foolhardy to suggest that we have seen the worst, but that is a strong possibility. December 1990 figures may not show much improvement, but the preconditions for a turnaround in the economy were becoming apparent in early 1991, when this was written.

Gas prices were well below their peaks. Interest rates had declined. The onset of war in the Persian Gulf had ended the great uncertainty over whether there would be military action. Although much concern and pain may lie ahead for thousands of families, the nation will begin adjusting to the new reality.

These conditions are positive signposts on the road to recovery. Few will accept them without added evidence, but the time could well be at hand to prepare for an improved market. Many firms will let the recovery race past, while they wait for a more detailed and convincing confirmation. These firms may regret their market share losses as others move ahead with positive programs. Δ

Morton J. Marcus is the director of the Indiana Business Research Center at Indiana University School of Business, where he is also a member of the faculty. Marcus specializes in using statistics to identify economic trends.

RV SHIPMENTS BY TYPE OF UNIT
(Adjusted for seasonal variation)

Type of Units	Nov. '90	Change from Oct '90 Number	%	Year-to-Date 1990	1989	Change Number	%
TOTAL RVs	[illegible]						
Travel Trailers:	6,180	–400	–6.1	80,450	83,090	–2,640	–3.2
Conventional	3,490	–410	–10.6	47,720	49,270	–1,550	–3.1
Park Models	550	70	13.6	6,630	6,960	–330	–4.7
Fifth-wheels	2,140	–50	– 2.5	26,110	26,860	–760	–2.8
Folding Camping Trailers	1,940	–1,030	–34.7	28,800	30,640	–1,840	–6.0
Truck Campers	610	–300	–32.6	8,950	9,080	–130	–1.4
TOTAL TOWABLES	[illegible]						
Motorhomes:							
Class A	1,590	–240	–12.9	27,170	32,560	–5,390	–16.6
Class B Van Campers	450	20	5.2	5,510	4,550	960	21.1
Class C:	1,010	–320	–24.3	16,250	19,240	–2,990	–15.5
– Minis	760	–180	–19.2	12,580	15,810	–3,230	–20.4
– Low Profiles	0	0	0.0	510	1,260	–760	–59.7
– Micro-minis	240	–140	–36.8	3,160	2,170	990	45.8
TOTAL MOTORHOMES	[illegible]						
Multiuse Van Conversions	11,180	–1,600	–12.5	163,750	184,210	–20,460	–11.1

Note: Data rounded to nearest 10 units.

Figure 6

1990'S DISMAL END MAY NOT FORETELL FUTURE

GAYLORD MAXWELL

Not surprisingly, the RV retail scene was dismal last December. Perhaps the only surprise was that there was as much business as there was. Actually, one-third of the Dealer Advisory Board (DAB) members were able to top December 1989 sales figures in dollars, but unit totals for the group were off sharply in both new and used categories.

Although there were some good marks for grosses (particularly for new motorhomes and used units), profits were dismal. Bottom lines were rated poor by all but three DAB members, who judged them fair. Both new and used inventories tended to be on the high side, as traffic was poor and new buyers scarce.

In spite of these gloomy facts, there was some light. Three members of the board (all smaller medium-size dealers) actually topped their December 1989 sales.

Unfortunately, the wonderful start the industry had in the early months of 1990 was short-lived. The economic slowdown began to affect sales during the early summer, and the Persian Gulf crisis really put the brakes on buying. Overall, however, it was not a disastrous year. Three-fourths of DAB members took in more dollars than they did in 1989. Total sales volume was down only 8%. Three RV types – all towables – were actually up in new-unit sales, and total unit sales were down only 2%. In short, our DAB was down at the end of the year, but definitely not out.

A positive note is that, as this was being written in late January, the year seemed to be off to a good start. Early reports indicated that buyers were out at the shows and that activity had picked up at dealerships. Most dealers with whom we talked felt that the stage was set for a very respectable 1991.

Motorhomes:

New-unit sales of motorhomes were down in December 1990, but the percentage drop was actually less than that for the year-to-date. Most members of the DAB managed to stay fairly close to their tally of the preceding December, although a couple of the "heavy hitters" fell significantly short of the mark. Used-unit sales were exceptionally poor – down 34%. Grosses were rated very mixed and ranged from poor to good.

Motorized RVs suffered the greatest sales slump of any type in 1990 – down nearly 20% in new-unit sales. However, used sales ended nearly equal to those of the previous year.

Very positive early show reports of motorhome sales, the introduction of many new diesel types (especially medium-size units with smaller engines) and the average American's love affair with machines all seem to provide valid reasons for optimism about the coming year.

Travel Trailers:

December 1990 was the nearest thing to disaster for trailer sales. The drop from last year's numbers was severe in both new and used units. And profit ratings reflected an equally grim picture – mostly poor.

Fortunately, due to the excellent start this type got in the early months of the year, 1990 ended with a slight increase over the previous year in new units and only a half-dozen units down in used.

Considering the upswing in the year just past, there's reason for optimism for the present year when the Mideast war is over and the recession is behind us.

Truck Campers:

New slide-ins performed as well in the closing month of 1990 as they had during December of 1989. The numbers weren't large, but the fact that they were the same

	NEW UNITS						USED UNITS					
	FOR MONTH			YEAR-TO-DATE			FOR MONTH			YEAR-TO-DATE		
	DEC. 1990	DEC. 1989	% CHANGE	1990	1989	% CHANGE	DEC. 1990	DEC. 1989	% CHANGE	1990	1989	% CHANGE
MOTORHOMES	60	71	– 15	1,209	1,492	– 19	51	77	– 34	1,381	1,427	– 3
TRAVEL TRAILERS	26	40	– 35	1,212	1,122	+ 8	24	36	– 33	1,065	1,072	< – 1
TRUCK CAMPERS	19	19	0	298	347	– 14	7	5	+ 40	191	156	+ 22
CAMPING TRAILERS	8	3	+ 160	913	894	+ 2	2	5	– 60	299	318	– 6
FIFTH-WHEELS	21	19	+ 11	544	466	+ 17	10	13	– 23	315	309	+ 2

	FOR MONTH			YEAR-TO-DATE		
	DEC. 1990	DEC. 1989	% CHANGE	1990	1989	% CHANGE
SALES VOLUME	$5,752,000	$7,483,000	– 23	$136,696,000	$149,274,000	– 8
TOTAL UNIT SALES	228	288	– 21	7,427	7,603	– 2
NEW-UNIT SALES	134	152	– 12	4,176	4,321	– 3
USED-UNIT SALES	94	136	– 31	3,251	3,282	– 1

The "DAB Perspective" is a compilation of data provided by *RV Business*' Dealer Advisory Board, a group comprised of 23 dealers representing a cross section of the U.S. dealer body.

Gaylord Maxwell, chairman; **Dave Altman,** Baldwin Park, Calif.; **Bob Azevedo,** Sunnyvale, Calif.; **Jack Cole,** Pacoima, Calif.; **David McMann,** Victor, N.Y.; **Crosby Forrest,** Newport News, Va.; **Dan Gamel,** Fresno, Calif.; **Jerry Greer,** Columbus, Ohio; **Jerry Harrison,** Waco, Texas; **Robert Jensen,** Layton, Utah; **Johnny Ketelsen,** Marion, Iowa; **Newton Kindlund,** Orlando, Fla.; **Roger Kirschner,** Salem, Ore.; **Ozzie Lenhard,** Sayville, N.Y.; **Larry McClain,** Oklahoma City, Okla.; **Annette Miller,** Fayetteville, N.C.; **Steve Moran,** Warwick, R.I.; **Tom Schaeffer,** Shoemakersville, Pa.; **Mel Shipp,** Chattanooga, Tenn.; **Jack Sisemore,** Amarillo, Texas; **Bill Thomas,** Bridgeton, Mo.; **Randy Thompson,** Crystal Lake, Ill.

This report is an attempt to reflect the current retail sales picture; it does not purport to indicate RV production or factory sales to dealers.

indicated that interest hadn't waned. Used sales were off a great deal in percentages, but not much in actual unit numbers. Profits were rated poor.

Year-to-date, sales of new units lagged behind the same period of 1989. Used sales were up, however.

Although serious camper dealers were generally down a bit in 1990, they did well. There is no reason to believe they would not do equally well in 1991.

Camping Trailers:

As is typical for December, both new- and used-unit figures for the month were too low to be meaningful.

Year-to-date, fold-downs ended 1990 slightly ahead of the preceding year for our DAB. Although a 2% increase is not much, holding your own in a generally down year is great. Most specialists in this category held their own.

Three-fourths of DAB members took in more dollars than they did in 1989. Total sales volume was down only 8%. Three RV types—all towables—were actually up in new-unit sales, and total unit sales were down only 2%.

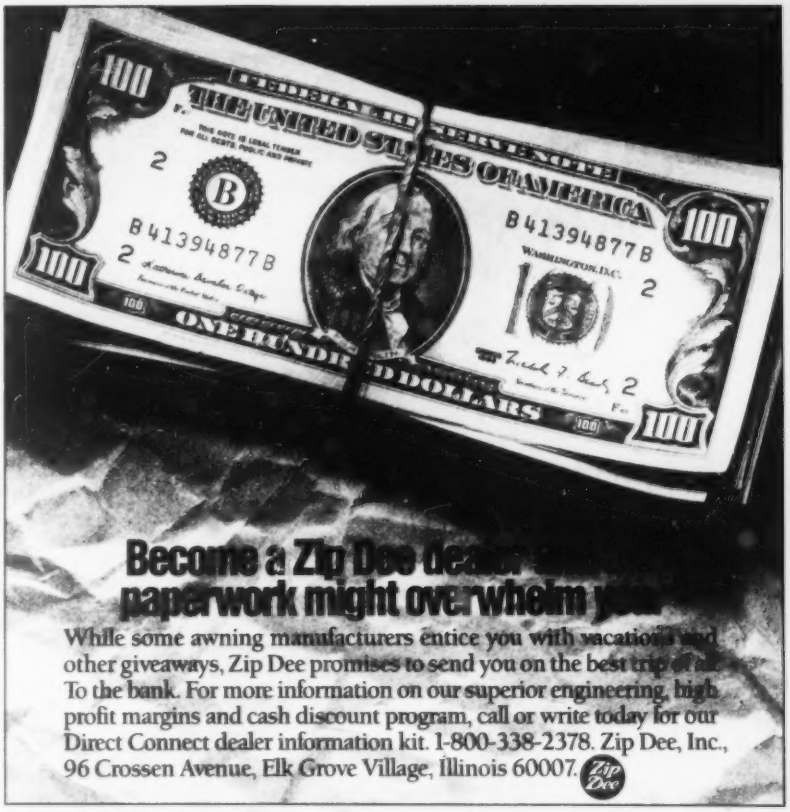
If the economy should turn around and blue-collar workers again feel secure in their jobs, this type could rebound in 1991.

Fifth-Wheels:

Fivers did well in December 1990, as they had all year. The numbers in both percentages and units were not large, but they were in the plus column. Considering the year overall, that is great. Profit ratings were quite mixed but tended to be on the poor side.

Year-to-date, 1990 was a fine year for fifth-wheels. With only a couple of exceptions, those dealers who seriously stocked this type not only got the units, they got the grosses.

It's a picture that has no reason to change. Δ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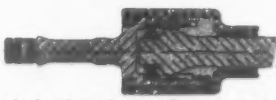

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MOTORHOME AND RV-TRAILER SALES BOTH HIT HARD IN OCTOBER '90

THOMAS WALWORTH

East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin. **Mountain**: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Northeast**: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont. **Pacific**: Alaska, California, Oregon, Washington, Hawaii. **South Atlantic**: Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **West North Central**: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **South Central**: Texas, Oklahoma, Arkansas, Louisiana, Tennessee, Mississippi, Alabama.

Complete data on October 1990 RV-trailer and motorhome registrations show that, for the 1990 year-to-date, the motorhome industry was down by 17.2%, while the RV-trailer market was down 4.2%.

For the month of October 1990, the motorhome market was off 38.2%, or 1,530 units, compared with October 1989. Figure 1 lists the seven national regions ranked according to the percent change in motorhome sales from October a year earlier. In the top-ranked South Central market, Mississippi recorded the largest percentage increase for the month. The East North Central states trailed the rankings, with Vermont having the largest decline.

For 1990 year-to-date last October, motorhome sales were down by 17.2%, or 8,354 units, compared with the same 10-month period of a year earlier. Figure 2 ranks the national regions according to their percent change in motorhome sales compared with 1989. The South Central region again led the rankings, with Mississippi again reporting the highest increase among those states for the year-to-date. The Northeast was bottom-ranked, and New Hampshire had the biggest percent decline there.

The RV-trailer industry in October 1990 declined by 21.5%—a 1,614-unit drop—compared with October of the previous year. Figure 3 shows the regional rankings based on the percent change in trailer sales compared with October 1989. The Mountain region led all others, with Wyoming experiencing the highest percent gain among those states. In the last-place Northeast, Maine came in with the largest decline for the month.

For 1990 year-to-date, October's RV-

MOTORHOMES, OCT. '90

Oct. '90 Rank	Region	% of Change From Oct. '89	Sept. '90 Rank
1	S. Central	−11.3	4
2	Mountain	−31.6	2
3	Pacific	−37.6	3
4	W.N. Central	−42.8	5
5	S. Atlantic	−44.5	7
6	Northeast	−44.9	6
7	E.N. Central	−45.4	1

Figure 1

MOTORHOMES, YEAR-TO-DATE

Oct. '90 Rank	Region	% of Change Year-to-Date	Sept. '90 Rank
1	S. Central	− 8.8	1
2	Mountain	−14.3	2
3	Pacific	−14.8	3
4	W.N. Central	−15.4	4
5	S. Atlantic	−18.4	5
6	E.N. Central	−22.6	6
7	Northeast	−25.6	7

Figure 2

RV TRAILERS, OCT. '90

Oct. '90 Rank	Region	% of Change From Oct. '89	Sept. '90 Rank
1	Mountain	−11.4	7
2	Pacific	−14.6	2
3	S. Atlantic	−19.5	6
4	S. Central	−23.4	3
5	W.N. Central	−23.4	4
6	E.N. Central	−28.4	1
7	Northeast	−28.8	5

Figure 3

RV TRAILERS, YEAR-TO-DATE

Oct. '90 Rank	Region	% of Change Year-to-Date	Sept. '90 Rank
1	S. Central	7.0	1
2	Mountain	3.4	2
3	Pacific	.8	3
4	W.N. Central	− 2.7	4
5	E.N. Central	− 7.0	5
6	S. Atlantic	− 7.0	6
7	Northeast	−16.9	7

Figure 4

GRAPHICS: DIGITAL LIFT

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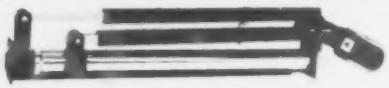
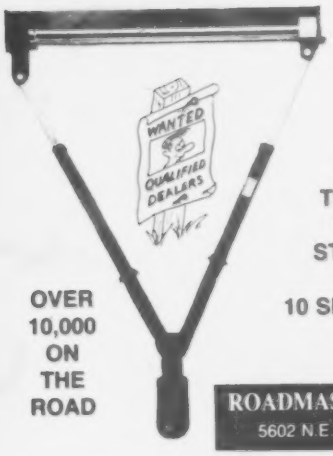

PATENT PENDING



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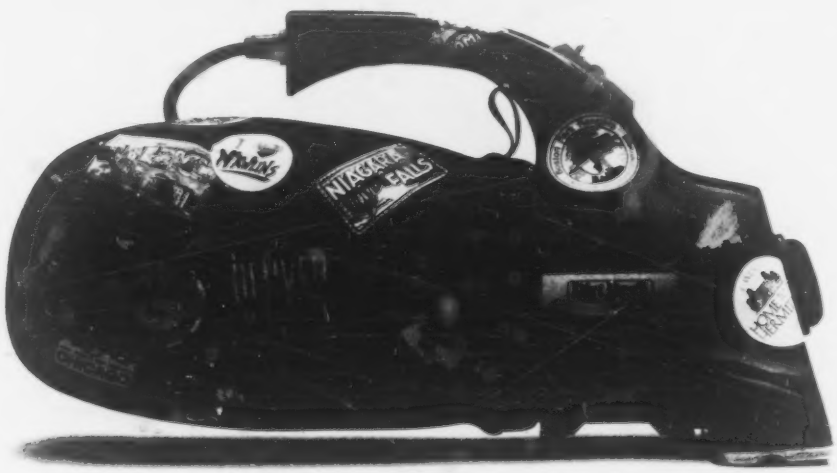
AT RETAIL *continued*

trailer figures showed the market down by 4.6%, which was 4,094 units off the pace of the first 10 months of 1989. In Figure 4, the seven regions are listed according to their percent of change in year-to-date trailer sales compared with the same period of 1989. In the leading South Central region, Alabama had the greatest increase for the 1990 year-to-date. The Northeast fell behind all other regions, with New Hampshire recording the largest decline.

Clearly, both the motorhome and RV-trailer markets of the industry were hard-hit. If there was any good news as of last October, it was that the sales downturn was taking place during the year's slower sales season. The October-February period is traditionally the slowest in terms of retail sales. If the weak sales continue through February of 1991, it could set the stage for a very strong spring season. The demand for the product is out there, and perhaps lower interest rates and an improved world situation will bring the market back very strongly. Δ

Thomas Walworth is general manager of Statistical Surveys Inc., Grand Rapids, Mich., which has reported retail statistics for 30 years to the RV industry. Statistical Surveys is an acknowledged leader in the RV statistical field.



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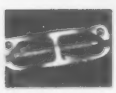

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